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Mental Models in Expert Physics Reasoning

Jeremy Roschelle and James G. Greeno

University of California, Berkeley

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Mental Models in Expert Physics Reasoning

Jeremy Roschelle and James G. Greeno

University of California, Berkeley

Abstract

We propose a *relational* framework for characterizing experienced physicists' representations of physics problem situations and the process of constructing these representations. A representation includes a coherent set of relations among (1) a mental model of the objects in the situation, along with their relevant properties and relations, (2) a mental model of theoretical idealizations of objects, and (3) parameter histories based on mental simulations of both models. Evidence from protocols and a small experiment support a conclusion that experienced physicists' processes of representing problem situations (a) use informal, commonsense knowledge, including envisionment of objects in the situations, and (b) are interactive, with mutual influences between informal knowledge and their technical, theoretical knowledge. We also describe characteristics of the mental models that represent problem situations and the process of constructing them, drawing from work by AI researchers on qualitative process models, and specifying several categories of rules that would be needed for an implementation of the system as a simulation program.



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going to go in whichever direction it needs to point to oppose the motion between the little mass and the big mass it's sitting on. And that happens to be to the right if the big mass is moving to the right.

This protocol illustrates several features of mental models that we will discuss.

First, the protocol indicates that the diagram was parsed into sets of components that operate as systems. The reference to an "extra mass" suggests strongly that the two blocks connected by the string form a constituent unit, and the remaining block is "extra." The process of organizing problem situations into a set of constituent units is one important feature of problem representation.

Second, a process of envisioning apparently aided the subject in constructing a representation. We interpret his comment, "there's everything accelerating to the right," as an inference based on imagining movement caused by gravity pulling the hanging block downward. The comment, "then so will this top mass," did not result from a formal computation or principle — in fact, it opposed a feature of the force diagram that that the subject mentioned. It seems reasonable then, to interpret the subject's inference as an envisionment based on familiar experience such as pulling a wagon that has a box on it.

A third feature is the interplay between representations based on theoretical concepts and representations of objects at the level of ordinary experience. This interplay produced a conflict that the subject resolved by an interesting reformulation of his understanding.

The subject's construction of a force diagram involved an internalized version of a process taught in most physics classes, drawing a free body diagram. In drawing a free body diagram, one draws a force vector for each force acting on a body. The subject said "friction is the only force moving [the top mass];" he apparently focused on lateral forces, since vertical forces are irrelevant to the issue of lateral movement. One common rule or thumb for determining the direction of the friction force vector is "friction opposes motion." Use of that

heuristic could have led to the statement, "OK, the thing's moving to the right, so friction is to the left."

The subject's representation at this point contained a conflict. He had concluded that the lateral force on the top block was friction, pointing to the left. This would lead to an inference that the top block should move to the left -- the body should accelerate in the direction of the force. In the informal envisionment, however, the top block was moving to the right, along with the bottom block.

The subject resolved the conflict by revising his mental force diagram. He said, "the answer is -- that friction opposes relative motion, ... the motion between the little mass and the big mass it's sitting on." This reformulation would allow the subject to draw a new force diagram with the force vector for friction in the correct direction, to the right. By revising the theoretical terms of the representation the subject achieved a mental model in which the informal envisionment and the theoretical features were consistent.

2. A General Framework

We propose a framework for characterizing problem representation and reasoning that we call a *relational* framework. The components of the framework are shown in Figure 2. We call this framework the relational framework because it concerns strong, stable relations between different kinds of representation.

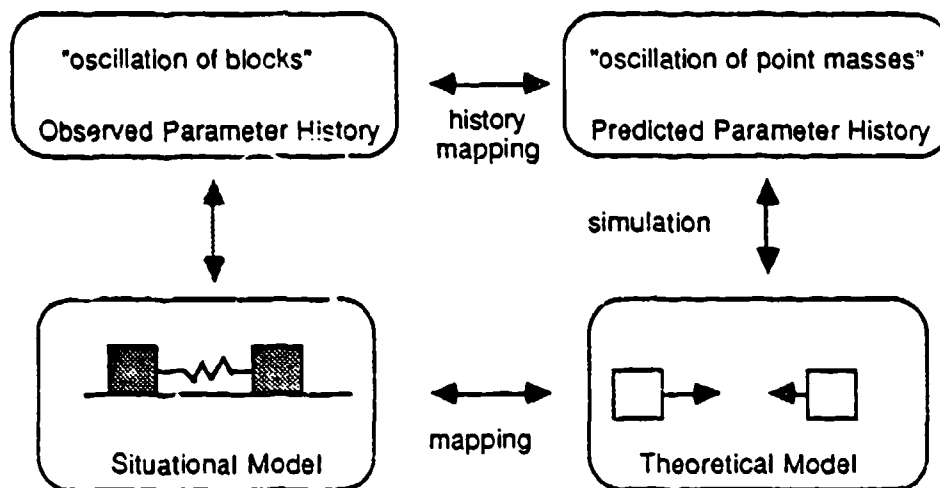


Figure 2: The Relational Framework

A common problem in physics is to provide a coherent explanation of some observable phenomenon. We propose that this explanation can often be characterized as an integrated set of relations among the four components in Figure 2. The components on the left, the situation model and the observed parameter history, correspond to features of the phenomenon that can be observed. The situation model represents objects, properties, and relations in the concrete situation that the physicist considers significant. The parameter history involves features of the dynamic behavior of the system. This is a sequence of the values of some measurable quantities over time. The representation that we call a situation model is like the mental models discussed by Holland, Holyoak, Nisbett, and Thagard (1986) and by Johnson-Laird (1983), and the situation models discussed by vanDijk and Kintsch (1983). The idea of a parameter history follows Forbus (1984).

The physicist's explanation connects the situation model and the parameter history with two additional components: a theoretical model and a set of predictions. The theoretical model, like the situation model, consists of some entities and some relations between them. The entities consist of idealizations such as point masses and forces. Additionally, the theoretical model has properties that make it mathematically tractable, though physicists may also conceive of the model visually. Simulation based on the theoretical model also forms a

3. Further Discussion and Examples

In this section we discuss examples from four protocols that illustrate the relational framework. The subjects were three experienced physicists: a university professor, a graduate student, and a high school teacher. All the subjects had been teaching introductory physics in the past year. The physicists were shown sketches of situation like those found in textbook problems; however the exact configurations were novel to all three subjects. The sketches were not accompanied by any text or additional information. The subjects were not told what the question was. Instead they were asked to explain, "What's happening?"

First, consider the introductory example. According to the interpretation given in Section 1, the physicist recognized a conflict between two envisionings of the motion of the "extra" block. One of his envisionings predicted a parameter history of motion to the right; the other envisioning produced a parameter history of motion to the left. We use the framework of Figure 2. The first parameter history, with motion to the right, derives from a commonsense envisioning of a situational model, involving objects that move according to principles that are familiar from ordinary experience. The second parameter history, with movement of the "extra" block to the left, is based on the physicist's theoretical model, involving the direction of a friction force.

In this example, all the components of the relational framework are in place – both the situational and theoretical models and the derived qualitative parameter histories. The physicist recognized a contradiction implied by the mapping between the situational and theoretical parameter histories. The physicist resolved the contradiction by introducing a refined heuristic for constructing the theoretical model: he expressed this with the statement that "friction opposes relative motion." In this case, commonsense knowledge enabled the physicist to recognize and correct an error in a scientific heuristic.

Now consider a second example based on the sketch in Figure 3.

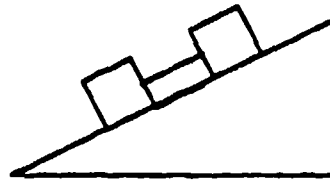


Figure 3. A situation with connected blocks.

I've never seen this situation before.... We have two masses, I would say with different masses, and let's assume there is a string and not a fixed bar -- with a fixed bar it's of no interest....

Then if there is not so much friction the whole system will go to the left, and if [otherwise] ... no motion at all.... I'm thinking about: if the right block will become higher velocity than the left block?

No, no! That's not possible at all,... they must have the same acceleration because I know that acceleration does not depend on mass.... so that's not an interesting physics problem because they always have the same distance, and it does not depend on mass -- that was my first idea [that it does depend on mass] -- it was a commonsense idea. It does not matter if there is a thread or a bar because both have the same acceleration.

In this protocol, the subject began with some assumptions about the physical situation. This suggests that he was creating a situational mental model. In the second paragraph, the subject envisioned the motion of the objects in the situation under a variety of conditions. The result of this envisioning was a set of situational parameter histories that the physicist was to duplicate in his theoretical parameter history via his theoretical model. Included in the set of parameter histories is one -- "the right block will become higher velocity than the left" -- about which the subject was not sure.

In the next paragraph, the subject constructed a theoretical mental model of the situation, as indicated by his introduction of theoretical terms like "mass" and "acceleration." The subject recognized a constraint over the possible parameter histories that this model can generate: "they must always have the same distance." This constraint led him to reject the

situational parameter history in which the blocks have different velocities as a commonsense mistake.

The contrast between these two examples reveals an important point: In textbook problem solving, unlike laboratory problem solving, the subject must produce both the observed parameter history and the theoretically-predicted parameter history. Therefore the possibility exists that either the subject's situational knowledge or the subject's theoretical knowledge may be wrong. In the first protocol, the physicist's theoretical representation contained an error, while his situational understanding was basically correct. In the second protocol the opposite was true. This point implies a larger role for commonsense knowledge in scientific reasoning than has typically been described in studies of physics problem solving.

The next two examples illustrate how reasoning strategies propagate along the links in the relational framework. One protocol comes from the diagram in Figure 4:

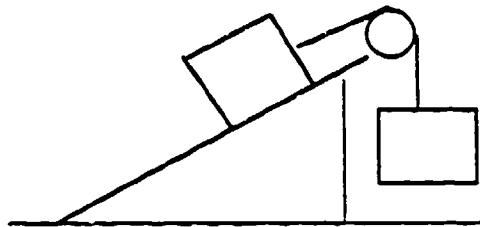


Figure 4. Another situation.

When shown this sketch, the subject immediately began constructing a theoretical representation based on the assumption that the string was always taut. The experimenter noted that the subject had not made that assumption for the sketch in the previous example, though both deal with two blocks, a string and an incline plane. The subject explained his assumption as follows:

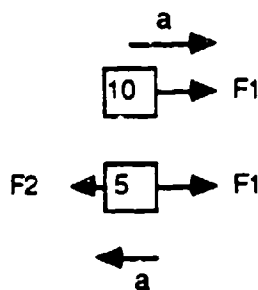
The string is always going to be taut. I can't tell you why I knew that immediately. I guess because the mass is hanging so that is going to keep the string taut all the time. Unless something weird is going on – I can't imagine what.

The reasoning in this segment notably lacked any theoretical content – no mention of forces or constraint laws. In fact the reasoning was distinctly causal and circular from the Newtonian point of view: the hanging block is not keeping the string taut any more than the string is keeping the block hanging. The physicist did not cite any principles or scientific analyses to back up his assumption. In fact, the physicist appeared to generate confidence in his assumption purely from his inability to imagine the situation being such that the string was not taut. So in this case, we would say that inferences from the situational model propagated directly to the theoretical model without any further checking. We find this is frequently a feature of experienced physicists' reasoning: physicists prefer to make certain inferences, especially those regarding the state of strings, based on situational, rather than theoretical models.

The next example shows a propagation in the opposite direction: from the theoretical model to the situational one. Another physicist discussed the way he viewed sketches like Figure 4 as follows: "I make believe the string's not there and I imagine the whole system as one in which this one [block] is touching that one [the other block] and they're glued together." In this case, the physicist took an operation on the theoretical model, considering rigidly-connected objects to be a single system, and created an operation on his situational model which is equivalent, gluing the blocks together. We suppose that this enables the physicist to make inferences about the system based on commonsense rather than using a model with abstract entities like forces and constraint laws. Through their situational interpretations of theoretical operations, physicists may come to understand the theory in a more intuitively appealing way.

4. Influence of Surface Features

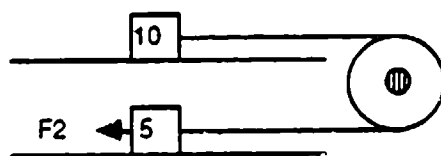
In this section, we report evidence from a small experiment addressing the question: How do surface features affect experienced physicist's performance? We use "surface features" in the sense of Chi, Feltovich, and Glaser's use of the term — the entities and relations visible on the surface of a sketch. We will compare the evidence with predictions from the transitional framework and from the relational framework in a competitive argument.



The accelerations are equal and opposite.
The top mass is 10 kg. The bottom mass is 5 kg.
 $F2 = 30 \text{ N}$

Find the acceleration.

Figure 5



The pulley, string, and all surfaces are ideal.
The top mass is 10 kg. The bottom mass is 5 kg.
 $F2 = 30 \text{ N}$.

Find the acceleration.

Figure 6

The evidence comes from protocols of three physicists and physics graduate students who were asked to think aloud as they solved two carefully constructed physics problems. Figures 5 and 6 show the problems, which were presented to the subjects sequentially. The problems have identical deep structure; that is, the same mathematical solution applies to both. However, one problem of the pair is presented in free body diagram form with no surface features indicative of a real world situation. The second problem of the pair presents a real world situation, but no free body diagram. Note that this situation, two blocks on parallel tables

connected by a pulley, is not a situation typically found in physics textbooks, though it fits a class of situations often found which can be loosely categorized as "pulley problems."

An alternative hypothesis to the relational framework is that representations are constructed in a linear progression. We call this hypothesis the transitional framework, because it focuses on transitions between representations. (We discuss this alternative more fully in Section 6.) In such a progression, the surface feature representation would be constructed, and then used to construct the free body diagram representation. This framework predicts that once the problem solver develops the free body diagram, the surface feature representation has little or no role in developing the mathematical solution. Both Larkin (1983) and Chi, Feltovich, and Glaser (1981) have made statements to this effect: On this view, surface feature representation plays a diminished role in experienced physicist's problem solving. Thus we would expect equivalent performances from the physicists on the first and second problems, with and without surface features.

The relational framework, on the other hand, emphasizes persistent relations between knowledge at the level of familiar objects and at the level of the theoretical representation. In this framework, surface features form the basis of the situational mental model. This mental model has a continuing role in problem solving after the construction of the free body diagram. Thus we would expect experienced physicist's performance to be impaired on problems of sufficient complexity which omit surface features.

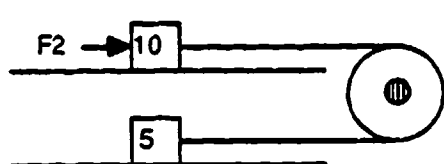
In our observations of three subjects that solved this pair of problems, several differences were noted between the performances on problem 1 and problem 2. First, the solution methods the subjects used for problem 1 differed from those used for problem 2. All subjects solved problem 2 by using a single $F=ma$ equation, combining the two masses for the value of "m", and using the value of the applied force for "F." In contrast, the solutions for problem 1 never directly combined the two masses, but instead used separate, simultaneous $F=ma$ equations for each mass. The solutions for the problem without surface features were

more complex than the solutions for the problem with surface features. Second, the subjects required a greater amount of time to solve problem 1, ranging from 2 to 20 minutes, than problem 2, which was solved within a minute by all subjects. Third, the physicists expressed much less confidence in their solution for problem 1 than for problem 2. This was particularly striking in one subject, who after studying the free body diagram for problem 1, declared that he believed the situation to be described inconsistently, and believed solution of the problem, therefore, to be impossible. This subject then set out to prove inconsistency. In the process of writing equations for each body, he made a sign error. Due to this sign error, his equations were in fact inconsistent, supporting his prediction that solution was impossible. However, the subject lacked confidence in this solution, and checked his logic many times. He never found the error.

In summary, on the problem without surface features, subjects used more complex solutions, more time, and had less confidence. These results more closely match the predictions of the relational framework than the transitional framework because the relational framework predicts that surface features continue to be important after the free body diagram is constructed.

In the experiment, the two problems discussed above were followed by two additional problems, designed to clarify a further difference between the transitional and relational frameworks. This difference has to do with the interpretation of surface features. One alternative is to treat surface features fairly literally. For example, the presence of a pulley-grapheme may be enough to trigger a particular solution schema. In the relational framework, on the other hand, surface features signify a real world situation, allowing the construction of a mental model representing the concrete objects in the situation. This mental model can then be run in the mind's eye to generate inferences. In short, the first alternative interprets surface features literally, while the relational framework focuses on the concrete mechanism that the surface features signify.

The two problems discussed above are ambiguous with respect to this difference -- the subjects could be choosing a different solution method for figure 6 because of either the literal surface features or the physical mechanism the surface features signify. The two additional problems given to the subjects help illuminate the difference.

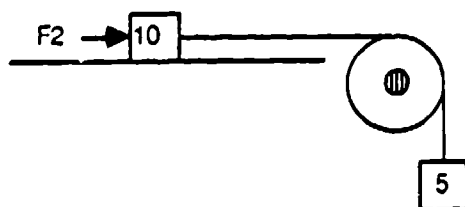


The pulley, string, and all surfaces are ideal.
The top mass is 10 kg. The bottom mass is 5 kg.
 $F_2 = 30 \text{ N}$.

Find the acceleration.

Figure 7

Figure 7 has the same surface features as figure 6, with one difference, the placement of the force arrow. This small difference in surface features results in a very different behavior: the blocks in figure 6 are coupled together by the taut string, but not in figure 7. If surface features are interpreted literally, subjects would be expected to choose the same solution method for figures 6 and 7. On the contrary, subjects immediately noticed the significance of the placement of the force arrow, and thus did not combine the masses of the two bodies in order to solve figure 7 in one equation. This suggests that these physicists used the surface features to build a working mental model of the concrete situation, in addition to any literal uses.



The pulley, string, and all surfaces are ideal.
The top mass is 10 kg. The bottom mass is 5 kg.
 $F_2 = 30 \text{ N}$.

Find the acceleration.

Figure 8

Figure 8 confirmed this result with a slightly different configuration of the same entities. In figure 8, the string can be either loose or taut depending on the applied force. Again the subjects took notice of this difference prior to working out a theoretical solution.

One subject's protocol for figure 8 was particularly interesting. This subject started the problem by noting the two different possible states of the string, taut and loose. He then decided to work on the situation with the taut string first. In doing so, he made a mistake, writing Newton's Second Law as " $a = m/F$ " rather than " $a = F/m$." After proceeding to a numerical solution, he reasoned that if the applied force were great enough the acceleration should approach free fall, which would be the boundary case between the taut and loose states. Next he consulted his equations, expecting to find the acceleration increase with the applied force. However, he noted that the force was in the denominator, which would indicate decreasing acceleration with increasing force. This disparity between his commonsense expectations and his theoretical model led him to find and correct his error. Without enough surface features to allow the subject to make inference about the behavior of the concrete mechanism, it is doubtful that he would have corrected his theoretical model.

5. Discussion: Constructing a Relational Representation

In this paper, we have introduced the relational framework, a framework for looking at physics problem solving. This view identifies strong, stable relations between representations of concrete, familiar situations and representations of abstract theoretical entities. In this view, interactions between concrete and abstract representations, as well as between commonsense and scientific knowledge are central to physicist's reasoning about novel physics problems. We have presented evidence from studies of experienced physicists that lead us to this view. In this section, we discuss characteristics of cognitive processes that are required in the relational framework and the kinds of mental models that we propose as the representations of physics problems by experienced physicists.

5.1. Qualitative Process Models Mental models have been discussed extensively elsewhere (Gentner and Stevens, 1983; Holland, et. al., 1986; Johnson-Laird, 1983). Basically, mental models are internal representations that duplicate properties and interrelations of external reality at the level of individual objects. Smith (1987) discusses one property of mental models that he calls "absorption." In representations that have the property of absorption, symbolic objects are like the objects they denote. Rules for combining and transforming symbolic objects and relations in the representation have results that are like the results of transformations of real objects and relations.

The mental models observed in physics problem solving have particular characteristics; they are qualitative, contain both physical and abstract objects, and represent dynamic processes. Representations of this kind have been studied by AI researchers in their investigations of qualitative reasoning (e.g., Forbus, 1984; deKleer & Brown, 1981; 1984). Our synthesis of these works follows:

A qualitative process model is a structure made up of connected qualitative process pieces (QPP's). A QPP describes a single process. In order to model a complex event, QPP's may be connected in serial (when the state of the system changes character at some point in time), in parallel (when two semi-independent systems are active), or embedded in one another (for more detailed views of subprocesses). Because they encode causal relations among parameters, QPP's facilitate qualitative reasoning. Abstracting the features of Forbus's (1984) and deKleer and Brown's theories (1984) yields an elementary QPP with the following components:

- some objects and their relevant parameters
- some parameter conditions which describe when the QPP is valid
- some qualitative causal relations, which describe how changes in parameters propagate
- some constraining relations, which reduce the degrees of freedom in the envisioning process

As Forbus has shown, a knowledge structure with these characteristics can represent both commonsense and scientific process models. Thus we take this structure to be the base representation of the situational model and the theoretical model. From qualitative process models of the situation, a reasoner could envision observed parameter histories, while qualitative process models of theoretical concepts could lead to predicted parameter histories.

We conjecture that much of knowledge in physics consists of knowledge of individual QPP's and of the connections between them. In addition, knowledge includes general principles and facts with applicability in many different processes. By encoding knowledge in the form of mental model pieces rather than individual propositions, physicists gain the coherence of a larger, more redundant knowledge structure. Moreover, increased efficiency results because physicists can now parse a problem situation according to mechanisms rather than individual objects.

For example, in the protocol of Section 1, the subject apparently parsed the situation into two systems with separate mechanisms. The first, we could call the Atwood's Machine QPP. An Atwood's machine is a pair of blocks suspended on the opposite sides of a pulley via a rope. Based on qualitative reasoning about this process, the subject could conclude that the system of the two blocks, string, and pulley would accelerate to the right and down. The second mechanism would be static friction, which operates between the block on the table and the top block. Static friction introduces a sideways force on the top block which causes that block's motion. These two processes are connected in parallel, because they are active simultaneously. Moreover, they are connected by a shared parameter, the force of friction, which acts on both systems.

In addition to the parallel connection between QPP's evident in this protocol, we might expect several transitional and embedding connections. For example, we can expect physicists to know that if the friction between the block and the table were great enough, no motion would occur. Thus a change in the friction coefficient between the block and table

could result in the process changing from one of static equilibrium to one of accelerated motion. Furthermore, a physicist might have embedded QPP's which represent the Atwood's Machine Process at varying levels of detail. For example, one physicist in our study explained that he could consider any "two-objects-connected problem" as either a single rigid body (in which case no tensions enter the analysis) or as two bodies connected by the tension in a string. In this case, the rigid body analysis could be connected to the string tension analysis by an embedding link, signifying that the latter process was a more detailed view of the former. Such links enable the reasoner to recall processes that are related the current representation in order to make inferences about different conditions or at different levels of detail.

5.2. Qualitative Reasoning Processes. Forbus (1984) and deKleer and Brown (1984) both give examples of algorithms that build qualitative process models for given situations. We hypothesize that physicists build the representations of the kind described in the relational framework using some of the component processes in these algorithms, without necessarily following a set flowchart. Instead subjects may build a relational framework via iterative refinement of the individual representational structures. The reasoning processes subjects use in iterative refinement may be captured in rules of several types.

For example, subjects may use envisioning rules to produce a predicted parameter history from a model. Envisioning rules may include very general rules for propagation of qualitative changes, as in Qualitative Process Theory. In addition, domain specific rules are likely to be present — "if equal and opposite forces act on a body it will not accelerate" is an example. Remember that subjects may need to generate parameter histories for the situation model as well as the theoretical model. In that case, envisioning rules may work from episodic memory of real world events. However, commonsense general principles, for example "heavy things fall faster," may figure in envisioning the situation model as well.

Another class of rules, comparator rules, are necessary to provide feedback about the consistency of the relational representation. Particularly relevant are comparisons between

the structure of the situation model and the theoretical model, and between the observed and predicted parameter histories. In addition to envisioning and comparator rules, two other classes of rules are necessary: selector and finder rules.

Selector rules retrieve QPP's and facts from long term memory to serve as the basis of the situational and theoretical models. The triggering conditions of these rules can vary widely. As Chi, Feltovich, and Glaser (1981) proposed, literal words and objects present in the surface feature sketch may cue knowledge retrieval. For example, the presence of blocks, a pulley, and a string might cue an Atwood's Machine QPP. Dynamic features might also serve as cues. For example, motion around a circle might cue an Circular Motion QPP. In addition, mathematical features might serve as cues. For example, one experienced physicist we observed used a spring process model in his analysis of an abstract situation, apparently because the given equation resembled the form of the equation for a spring. Finally, characteristics of the mechanism signified by the surface feature sketch may cue processes. For example, an Atwood's machine can be built with a rope, a wire, a chain. While these systems are different at the surface level, at a deeper level they all fit into an equivalence class defined by their mechanism of operation.

Once a set of QPP's is retrieved from LTM, finder rules serve to instantiate them. Finders, too, may draw information from a wide variety of sources. A simple finder might instantiate a model parameter with a literal piece of given information (such as "the initial velocity is 5 m/s"). Other finders might use general facts. For example, in one of the protocols discussed above, the physicist apparently inferred that the acceleration of both blocks on the incline plane would be the same from a general fact about blocks on incline planes. Another class of finders might use procedures to generate the needed information. Some of these procedures follow general principles. For example, most students learn a procedure for adding up the forces acting on a block on an incline plane to determine the acceleration. This procedure, while based on a theoretical model, may be compiled into a form which does not

require building a detailed representation of the acting forces. More complex finders might use the structure mapping between models in relational framework to map information from representation to representation. For instance, the reasoner might know that a block sitting on a table will not move in the vertical plane. This information might be used to instantiate the vertical acceleration as having the value zero.

6. General Implications

We conclude with some comments about relations of the scheme that we have presented to other recent discussions of representations and mental models in problem solving.

First, the relational framework for a textbook problem, including reciprocal interactions between situational and theoretical mental models with associated qualitative parameter histories, contrasts with an earlier model developed by McDermott and Larkin (1978). Their analysis involved a four-stage framework for understanding physics problem solving. Each of McDermott and Larkin's stages captures a level in a progression of representations: a statement of the problem in words, a sketch of the situation, a sketch of abstract entities (e.g. forces), and finally mathematical representation. In this framework, problem solving knowledge has two components: construction rules, which build the representation at the next stage from the representation at the previous stage, and elaboration rules, which enhance the information within a stage. We label this framework the *transitional* framework, because it describes a transition from representation to representation. Figure 9 shows the four stages with sketches corresponding to the representations that are formed for a problem involving a spring.

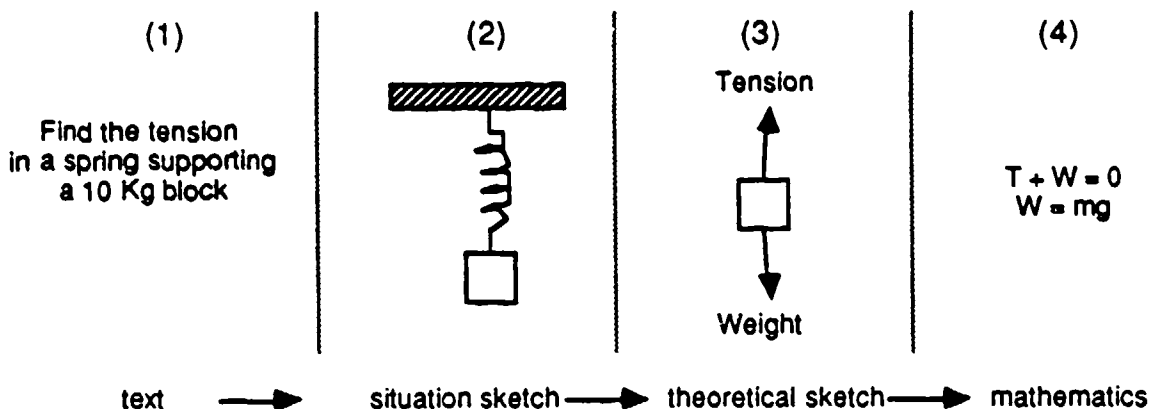


Figure 9: Four stages of the transitional framework

We believe that the relational framework is better adapted than the transitional framework for explaining several phenomena of physics problem solving including:

- envisioning
- problem and representation re-formulation
- ability to adapt to novel situations
- ability to recover from errors
- the importance of understanding the real-world situation

While we have argued that a relational framework best explains these phenomena, we believe that a transitional framework best explains other phenomena. We do not favor one framework over the other, but recognize the existence of both intertwined in physicists' problem solving behavior. Figure 10 shows how these frameworks might fit together.

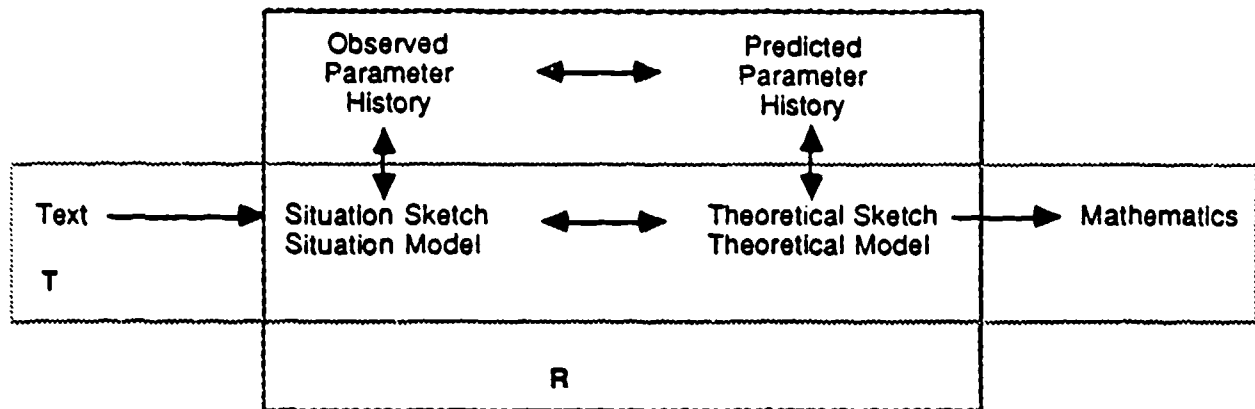


Figure 10: Transitional and Relational frameworks combined

Our analysis is also related to recent discussions of mental models, notably by Johnson-Laird (1983) and by Holland et al. (1986). Johnson-Laird analyzed syllogistic reasoning, involving tasks such as saying what follows from premises such as "Some actors are bakers, and no bakers are carpenters." His major conclusion was that individuals construct models of the premises, including tokens that correspond to individuals with properties that the premises refer to. There might be two tokens that are actors and bakers, two more tokens that are actors but not bakers. One of the actor-tokens could be a carpenter and another token could be added that is a carpenter, and neither an actor nor a baker. This would lead to the following tableau:

a -- b
a -- b
a
a ----- c
c

Based on this mental model, an individual might conclude that some actors are not carpenters, or that some actors are carpenters, or that some carpenters are not actors. Only the first of these is a valid conclusion from the premises. To eliminate the others, the reasoner

must construct additional models that differ from the one shown above, but that are also consistent with the premises. Johnson-Laird attributed errors in syllogistic reasoning to limitations of the process of generating models and holding them in memory.

In another recent discussion of mental models, Holland et al. (1986) proposed a hypothesis of a default hierarchy of rule-based models. A situation is categorized as specifically as possible, and situation-specific rules are used to interpret the situation and make inferences. If the specific model does not produce an adequate answer or interpretation, more general categories and rules are applied.

One example discussed by Holland et al. (1986) is an analysis of logical reasoning by Cheng and Holyoak (1985) and by Cheng, Holyoak, Nisbett, and Oliver (1986). These studies focused on a task introduced by Wason (1966) in which participants choose items to test a conditional proposition. For a statement "If A then B," tests should include both examination of A's, which must be B's, as well as non-B's, which must be non-A's. Cheng and her colleagues found that performance was facilitated when a pragmatic reasoning schema such as permission could be applied. For example, performance on a task based on "If the envelope is sealed, there must be a 2d stamp" was better when there was an explanation that sealing the envelope was allowed for first-class mail, which required a 2d stamp, than when the rule was given without an explanation.

Holland et al. (1986) contrasted reasoning in tasks involving logical propositions and tasks involving statistical inference. They characterize the rules of statistics as graceful, in that they build on and support rules that individuals know, and the rules of logic as alien, in that they are inconsistent with known rules. Formal training in inferential rules using the conditional proposition was ineffective unless it was accompanied by training using examples (Cheng et al., 1986), but in the case of the principles involved in the law of large numbers, both formal training and training involving examples were effective, and their combination was more effective than either kind of training by itself (Fong, Krantz & Nisbett, 1986).

The relational framework provides an alternative in which formal rules of inference and empirical rules based on experience interact productively. This extends the ideas of Holland et al. (1986), in which abstract rules are used when more specific rules fail to give adequate answers. In the relational framework that we have discussed, abstract rules supply constraints that are used in construction of the representations of specific situations and problems.

While our relational framework adds to the scheme of a default hierarchy, it is consistent with the main ideas of Holland et al.'s (1986) analysis. In particular, the idea of pragmatic schemata provides a plausible hypothesis about the process of constructing situation models. Causal relations, and schemata of physical mechanisms, provide bases for organizing the features of problems, enabling the use of inferential rules that the problem solver can then apply.

The relational framework has implications both for education and for future research. Physics courses typically emphasize quantitative rather qualitative solutions, and formulas rather than models. In addition, rather than helping students integrate their commonsense understanding of a situation with its theoretical model, physics instruction often implores students to leave the commonsense and familiar behind. If the relational framework is as important to expert-level problem solving as our studies indicate, this emphasis on the quantitative, formulaic, and theoretical prevents students from attaining competence. One of us, Roschelle, is currently exploring the use of computer-based simulations to help students acquire qualitative mental models of physics concepts. (See Roschelle 1986.)

In terms of basic research on cognition, we look for a better understanding of the interaction between situational and theoretical mental models in physics problem representation to be important in several areas. As discussed above, this interaction provides critical feedback for error-correction both in the situation model and the theoretical model. In

addition, case analysis, the strategy of considering several possible cases for problem situation in parallel, may have its basis in the understanding of the different states of behavior for a mechanism that qualitative analysis of both the situational and theoretical model provides. Finally, this interaction appears to be essential to physicist's planning for novel problems.

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Dr. Phillip L. Ackerman
University of Minnesota
Department of Psychology
Minneapolis, MN 55455

Dr. Meryl S. Baker
Navy Personnel R & D Center
San Diego, CA 92152-6800

Dr. Jeff Bonar
Learning R&D Center
University of Pittsburgh
Pittsburgh, PA 15260

Dr. Beth Adelson
Department of Computer Science
Tufts University
Medford, MA 02155

Dr. Eva L. Baker
Ctr. for the Study of Evaluation
145 Moore Hall, UCLA
Los Angeles, CA 90024

Dr. Gordon H. Bower
Department of Psychology
Stanford University
Stanford, CA 94306

AFOSR,
Life Sciences Directorate
Bolling Air Force Base
Washington, DC 20332

prof. dott. Bruno G. Bara
Unita di ricerca di intelligenza artificiale
Universita di Milano
20122 Milano - via F Sforza 23 ITALY

Dr. Robert Breaux
Code N-095R
Naval Training Systems Center
Orlando, FL 32813

Dr. Robert Ahlers
Human Factors Lab., Code N711
Naval Training Systems Center
Orlando, FL 32813

Dr. William M. Bart
Dept. of Ed. Psych., 330 Burton Hall
178 Pillsbury Dr., S.E.
Minneapolis, MN 55455

Dr. Shirley Brice Heath
School of Education
Stanford University
Stanford, CA 94305

Dr. Ed Aiken
Navy Personnel R&D Center
San Diego, CA 92152-6800

Leo Beltracchi
U. S. Nuclear Regulatory Comm.
Washington, DC 20555

Dr. John S. Brown
XEROX Palo Alto Research Center
3333 Coyote Hill Road
Palo Alto, CA 94304

Dr. John R. Anderson
Department of Psychology
Carnegie-Mellon University
Pittsburgh, PA 15213

Dr. Mark H. Bickhard
University of Texas
EDB 504 Ed. Psych
Austin, TX 78712

Dr. Ann Brown
Ctr for the Study of Reading
51 Gerty Drive, Univ of Illinois
Champaign, IL 61280

Dr. James Anderson
Brown University
Center for Neural Science
Providence, RI 02912

Dr. Gautam Biswas
Department of Computer Science
University of South Carolina
Columbia, SC 29208

Dr. Bruce Buchanan
Computer Science Department
Stanford University
Stanford, CA 94305

Dr. Steve Andriole
George Mason U/Info Tech & Eng
4400 University Dr.
Fairfax, VA 22030

Dr. John Black
Teachers College, Columbia Univ.
525 West 121st Street
New York, NY 10027

Maj. Hugh Burns
AFHRL/IDE
Lowry AFB, CO 80230-5000

Dr. Gary Aston-Jones
Dept. of Biology, N.Y.U.
1009 Main Bldg., Washington Sq.
New York, NY 10003

Dr. R. Darrell Bock
University of Chicago, NORC
6030 South Ellis
Chicago, IL 60637

Dr. Patricia A. Butler
OERI
555 New Jersey Avenue, NW
Washington, DC 20208

Dr. Patricia Baggett
Dept. of Psych., Box 345
University of Colorado
Boulder, CO 80309

Dr. Sue Bogner
Army Research Institute, (PERI-SF)
5001 Eisenhower Avenue
Alexandria, VA 22333-5800

Dr. Joseph C. Campione
Ctr. for the Study of Reading
51 Gerty Dr., Univ. of Illinois
Champaign, IL 61820

Joanne Capper
Center for Research into Practice
1718 Connecticut Ave., N.W.
Washington, DC 20009

Chair, Dept of Psych
Georgetown University
Washington, DC 20057

Dr. Charles Clifton
Dept of Psych, Tobin Hall
University of Massachusetts
Amherst, MA 01003

Dr. Jaime Carbonell
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Chair, Dept of Psych
George Mason University
Fairfax, VA 22030

Dr. Allan M. Collins
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. Susan Carey
Harvard Grad. School of Ed.
337 Gutman Library, Appian Way
Cambridge, MA 02138

Dr. Fred Chang
Navy Personnel R&D Center
Code 51
San Diego, CA 92152-6800

Dr. Stanley Collyer
Office of Naval Tech., Code 222
800 North Quincy Street
Arlington, VA 22217-5000

Dr. Pat Carpenter
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Dr. Davida Charney
English Department
Penn State University
University Park, PA 16802

Dr. William Crano
Department of Psychology
Texas A&M University
College Station, TX 77843

LCDR Robert Carter
Office of the Chief of Naval
Operations, OP-01B, Pentagon
Washington, DC 20350-2000

Dr. Paul R. Chatelier
OUSDRE
Pentagon
Washington, DC 20350-2000

Bryan Dallman
3400 TTW/TTGXS
Lowry AFB, CO 80230-5000

Chair
Dept of Computer Sciences
U.S. Naval Academy
Annapolis, MD 21402

Dr. Michelene Chi
University of Pittsburgh, L.R.D.C.
3939 O'Hara Street
Pittsburgh, PA 15213

Dr. Laura Davis
NRL/NCARAI Code 7510
4555 Overlook Ave., S.W.
Washington, DC 20375-5000

Chair
Department of Psychology
Towson State University
Towson, MD 21204

Dr. L. J. Chmura
Comp. Sci. and Syst. Branch
Naval Research Lab.
Washington, DC 20375-5000

Defense Technical
Information Center (Attn. T. C.)
Cameron Station, Bldg. 5
Alexandria, VA 22314 (12 copies)

Chair, Department of
Computer Science
Towson State University
Towson, MD 21204

Mr. Raymond E. Christal
AFHRL/MOE
Brooks AFB
San Antonio, TX 78235

Dr. Natalie Dehn
Dept. of Comp. and Info. Science
University of Oregon
Eugene, OR 97403

Chair, Dept of Psych
The Johns Hopkins University
Baltimore, MD 21218

Dr. Yee-Yeen Chu
Perceptronics, Inc.
21111 Erwin Street
Woodland Hills, CA 91367-3713

Dr. Gerald F. DeJong
A.I. Grp., Coordinated Sci. Lab.
University of Illinois
Urbana, IL 61801

Chair, Dept of Psych
College of Arts and Sciences
Catholic University of America
Washington, DC 20064

Dr. William Clancey
Knowledge Syst. Lab., Stanford U.
701 Welch Rd., Bldg. C
Palo Alto, CA 94304

Georgy Delacote
Dir. de L'info. Sci. et Tech., CNRS
15, Quai Anatole France
75700 Paris FRANCE

Department
of Computer Science
Naval Postgraduate School
Monterey, CA 93940

Dr. Richard Duran
School of Education
University of California
Santa Barbara, CA 93106

Dr. Paul Feltovich
So Illinois Univ, Sch of Med
Med Educ Dept, P.O. Box 3926
Springfield, IL 62708

Dr. Sharon Derry
Department of Psychology
Florida State University
Tallahassee, FL 32303

Dr. John Ellis
Navy Personnel R&D Center
San Diego, CA 92252

Mr. Wallace Feurzeig
Ed Tech Ctr, Bolt Beranek & Newman
10 Moulton Street
Cambridge, MA 02238

Director
Manpower and Personnel Lab
NPRDC (Code 06)
San Diego, CA 92152-6800

Dr. Susan Embretson
University of Kansas
Psych. Dept., 428 Fraser
Lawrence, KS 66045

Dr. Gerhard Fischer
Department of Psychology
University of Colorado
Boulder, CO 80309

Director
Training Laboratory
NPRDC (Code 05)
San Diego, CA 92152-6800

Dr. Randy Engle
Department of Psychology
University of South Carolina
Columbia, SC 29208

Fleet Support Office,
NPRDC (Code 301)
San Diego, CA 92152-6800

Director, Human Factors
& Organizational Systems Lab
NPRDC (Code 07)
San Diego, CA 92152-6800

Dr. Susan Epstein
Hunter College
144 S. Mountain Avenue
Montclair, NJ 07042

J. D. Fletcher
9931 Corsica Street
Vienna, VA 22180

Dr. Andrea A. diSessa
School of Education, EMST
University of California
Berkeley, CA 94720

ERIC Facility
Acquisitions
4833 Rugby Avenue
Bethesda, MD 20014

Dr. Linda Flower
Carnegie-Mellon University
Department of English
Pittsburgh, PA 15213

Dr. R. K. Dismukes
Associate Director for Life Sciences
AFOSR, Bolling AFB
Washington, DC 20332

Dr. K. Anders Ericsson
University of Colorado
Department of Psychology
Boulder, CO 80309

Dr. Kenneth D. Forbus
Dept of Comp Sci, U of Illinois
1304 West Springfield Avenue
Urbana, IL 61801

Dr. Stephanie Doan
Code 6021
Naval Air Development Center
Warminster, PA 18974-5000

Dr. Jean Claude Falmagne
Department of Psychology
New York University
New York, NY 10003

Dr. Barbara A. Fox
University of Colorado
Department of Linguistics
Boulder, CO 80309

Dr. Emanuel Donchin
University of Illinois
Department of Psychology
Champaign, IL 61820

Dr. Beatrice J. Farr
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. John R. Frederiksen
Bolt Beranek & Newman
50 Moulton Street
Cambridge, MA 02138

Dr. Thomas M. Duffy
Communications Design Center
CMU, Schenley Park
Pittsburgh, PA 15213

Dr. Pat Federico
Code 511
NPRDC
San Diego, CA 92152-6800

Dr. Norman Frederiksen
Educational Testing Service
Princeton, NJ 08541

Dr. Michael Friendly
Psych Dept, York University
Toronto Ontario
CANADA M3J 1P3

Dr. Wayne Gray
Army Research Institute
3001 Eisenhower Avenue
Alexandria, VA 22333

Professor John R. Hayes
Carnegie-Mellon University
Dept of Psychology, Schenley Park
Pittsburgh, PA 15213

Julie A. Gadsden
Info Tech and Applications Div
Admiralty Research Est
Portsmouth, Portsmouth PO6 4AA U.K.

Dr. James G. Greeno
School of Education
Stanford University
Stanford, CA 94305

Dr. Barbara Hayes-Roth
Dept of Computer Science
Stanford University
Stanford, CA 94305

Dr. Michael Genesereth
Stanford University
Computer Science Department
Stanford, CA 94305

Dr. Dik Gregory
Behavioral Sciences Division
Admiralty Research Est.
Teddington, Middlesex ENGLAND

Dr. Frederick Hayes-Roth
Teknowledge
525 University Avenue
Palo Alto, CA 94301

Dr. Dedre Gentner
Dept of Psych, U of Illinois
603 E Daniel Street
Champaign, IL 61820

Dr. Gerhard Grossing
Atominstitut
Schutterstrasse 115
Vienna, AUSTRIA a-1020

Dr. Joan I. Heller
505 Haddon Road
Oakland, CA 94606

Dr. Robert Glaser
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15260

Prof. Edward Haertel
School of Education
Stanford University
Stanford, CA 94305

Dr. Jim Hollan
Intelligent Systems Group
Inst for Cog Sci (C-015), UCSD
La Jolla, CA 92093

Dr. Arthur M. Glenberg
WJ Brogden Psych Bldg
1202 W Johnson St, U of Wisconsin
Madison, WI 53706

Dr. Henry M. Halff
Halff Resources, Inc.
4918 33rd Road, North
Arlington, VA 22207

Dr. Melissa Holland
ARI for the Behavioral and Soc Sci
5001 Eisenhower Ave.
Alexandria, VA 22333

Dr. Sam Glucksberg
Dept of Psych, Green Hall
Princeton University
Princeton, NJ 08540

Dr. Ronald K. Hambleton
Prof of Ed and Psych
U of Mass at Amherst, Hills House
Amherst, MA 01003

Dr. Keith Holyoak
Human Performance Center
U of Michigan, 330 Packard Rd.
Ann Arbor, MI 48109

Dr. Susan Goldman
University of California
Santa Barbara, CA 93106

Steve Harnad, Editor
The Behavioral and Brain Sciences
20 Nassau Street, Suite 240
Princeton, NJ 08540

Ms. Julia S. Hough
Lawrence Erlbaum Associates
6012 Greene Street
Philadelphia, PA 19144

Dr. Sherrie Gott
AFHRL/MODJ
Brooks AFB, TX 78235

Dr. Wayne Harvey
SRI International
333 Ravenswood Ave, Rm B-S324
Menlo Park, CA 94025

Dr. James Howard, Dept of Psych
Human Performance Lab.
Catholic University of America
Washington, DC 20064

Dr. T. Govindaraj
Georgia Institute of Technology
Sch of Industrial & Syst Eng
Atlanta, GA 30332

Dr. Reid Hastie
Northwestern University
Department of Psychology
Evanston, IL 60201

Dr. Earl Hunt
Department of Psychology
University of Washington
Seattle, WA 98105

Dr. Ed Hutchins
Intelligent Systems Group
Inst for Cog Sci (C-015), UCSD
La Jolla, CA 92093

Dr. Douglas A. Jones
Thatcher Jones Assoc.
P.O. Box 6640, 10 Trafalgar Ct.
Lawrenceville, NJ 08648

Dr. Peter Kincaid
Training Analysis & Eval Group
Department of the Navy
Orlando, FL 32813

Dr. Barbara Hutson
Virginia Tech Graduate Center
2990 Telestar Ct.
Falls Church, VA 22042

Dr. Marcel Just
Carnegie-Mellon University
Dept of Psych, Schenley Park
Pittsburgh, PA 15213

Dr. Walter Kintsch
Dept of Psych, Campus Box 345
University of Colorado
Boulder, CO 80309

Dr. Barbel Inhelder
University of Geneva
Geneva SWITZERLAND 12U-4

Dr. Daniel Kahneman
The U of BC, Dept of Psych
#154-2053 Main Mall
Vancouver, BC CANADA V6T 1Y7

Dr. David Klahr
Carnegie-Mellon University
Dept of Psych, Schenley Park
Pittsburgh, PA 15213

Dr. Dillon Inouye
WICAT Education Institute
Provo, UT 84057

Dr. Ruth Kanfer
Dept of Psych, Elliot Hall
75 E River Rd, U of Minnesota
Minneapolis, MN 55455

Dr. Mazie Knerr
Training Research Div, HumRRO
1100 S. Washington
Alexandria, VA 22314

Dr. Alice Isen
Department of Psychology
University of Maryland
Catonsville, MD 21228

Dr. Mary Grace Kantowski
University of Florida, Math Ed
359 Norman Hall
Gainesville, FL 32611

Dr. Janet L. Kolodner
Georgia Institute of Technology
School of Info & Comp Sci
Atlanta, GA 30332

Dr. Robert Jannarone
Department of Psychology
University of South Carolina
Columbia, SC 29208

Dr. Milton S. Katz
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Stephen Kosslyn
Harvard U, 1236 William James Hall
33 Kirkland St.
Cambridge, MA 02138

Dr. Claude Janvier, Directeur, CIRAI
Universite' du Quebec a Montreal
Montreal, Quebec H3C 3P8
CANADA

Dr. Frank Keil
Department of Psychology
Cornell University
Ithaca, NY 14853

Dr. Kenneth Kotovsky, Dept of Psych
Comm Coll of Allegheny Co
800 Allegheny Avenue
Pittsburgh, PA 15233

Dr. Robin Jeffries
Hewlett-Packard Laboratories
P.O. Box 10490
Palo Alto, CA 94303-0971

Dr. Wendy Kellogg
IBM T. J. Watson Research Center
P.O. Box 218
Yorktown Heights, NY 10598

Dr. David H. Krantz
2 Washington Square Village
Apt. #15J
New York, NY 10012

Dr. Robert Jernigan
Decision Resource Systems
5595 Vantage Point Road
Columbia, MD 21044

Dr. Dennis Kibler
Dept of Info and Comp Sci
University of California
Irvine, CA 92717

Dr. Benjamin Kuipers
U of TX at Austin, Dept of Comp Sci
T.S. Painter Hall 3.28
Austin, TX 78712

Margaret Jerome
c/o Dr. Peter Chandler
83, The Drive
Hove, Sussex UNITED KINGDOM

Dr. David Kieras
Tech Comm, Coll of Engineering
1223 E. Engineering Bldg, U of MI
Ann Arbor, MI 48109

Dr. David R. Lambert
Naval Ocean Syst Ctr, Code 411T
271 Catalina Boulevard
San Diego, CA 92152-6800

Dr. Pat Langley
Dept of Info & Comp Sci
University of California
Irvine, CA 92717

Dr. Clayton Lewis
Dept of Comp Sci, Campus Box 430
University of Colorado
Boulder, CO 80309

Dr. Barbara Means
Human Resources Research Org
1100 South Washington
Alexandria, VA 22314

Dr. Marcy Lansman
U of NC, Davie Hall 013A
The L.L. Thurstone Lab.
Chapel Hill, NC 27514

Library
Naval Training Systems Center
Orlando, FL 32813

Dr. Douglas L. Medin
Dept of Psych, U of Illinois
603 E. Daniel Street
Champaign, IL 61820

Dr. Jill Larkin
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Library, NPRDC
Code P201L
San Diego, CA 92152-6800

Military Asst for Training
& Personnel Tech, OUSD (R & E)
Room 3D129, The Pentagon
Washington, DC 20301-3080

Dr. Jean Lave
School of Social Sciences
University of California
Irvine, CA 92717

Dr. Jane Malin
Mail Code SR 111
NASA Johnson Space Center
Houston, TX 77058

Dr. George A. Miller
Dept of Psych, Green Hall
Princeton University
Princeton, NJ 08540

Dr. Robert Lawler
Information Sciences, FRL
GTE Labs, Inc., 40 Sylvan Road
Waltham, MA 02254

Dr. William L. Maloy
Chief of Naval Education
and Training, Naval Air Station
Pensacola, FL 32508

Dr. William Montague
NPRDC Code 13
San Diego, CA 92152

Dr. Alan M. Lesgold
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Sandra P. Marshall
Department of Psychology
San Diego State University
San Diego, CA 92182

Dr. Allen Munro
Behavioral Tech Labs - USC
1845 S. Elena Avenue, 4th Floor
Redondo Beach, CA 90277

Dr. Jim Levin
Dept of Ed Psych, 210 Ed Bldg
1310 So Sixth St
Champaign, IL 61810-6990

Dr. Manton M. Matthews
Department of Computer Science
University of South Carolina
Columbia, SC 29208

Dr. Allen Newell
Carnegie-Mellon University
Dept of Psych, Schenley Park
Pittsburgh, PA 15213

Dr. John Levine
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Richard E. Mayer
Department of Psychology
University of California
Santa Barbara, CA 93106

Dr. Richard E. Nisbett
University of Michigan
Inst for Social Research, Rm. 5261
Ann Arbor, MI 48109

Dr. Michael Levine
Ed Psych, 210 Education Bldg
University of Illinois
Champaign, IL 61820

Dr. Joe McLachlan
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Mary Jo Nissen
University of Minnesota
N218 Elliott Hall
Minneapolis, MN 55455

Matt Lewis
Department of Psychology
Carnegie-Mellon University
Pittsburgh, PA 15213

Dr. James McMichael
Assistant for MPT Research,
Dev, and Studies, OP-01B7
Washington, DC 20370

Dr. Harold F. O'Neil, Jr.
School of Ed, WPH 801
Dept of Ed Psych & Tech - USC
Los Angeles, CA 90089-0031

Dr. Michael Oberlin
Naval Training Systems Center
Code 711
Orlando, FL 32813-7100

Dr. Virginia E. Pendergrass
Code 711
Naval Training Systems Center
Orlando, FL 32813-7100

Dr. Joseph Psotka
ATTN: PERI-1C
Army Research Institute
5001 Eisenhower Avenue

Office of Naval Research
Code 1142
800 North Quincy Street
Arlington, VA 22217-5000

Dr. David N. Perkins
Educational Technology Center
337 Gutman Library, Appian Way
Cambridge, MA 02138

Psychologist
Office of Naval Research
Branch Office, London, Box 39
FPO New York, NY 09510

Office of Naval Research
Code 1133
800 North Quincy Street
Arlington, VA 22217-5000

Dr. Nancy Perry, Chief
Naval Ed. and Training, Code 00A2A
Naval Station Pensacola
Pensacola, FL 32508

Psychologist
Office of Naval Research
Liaison Office, Far East
APO San Francisco, CA 96503

Dr. Steilan Ohlsson
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15213

Dr. Steven Pinker
Department of Psychology
E10-018, MIT
Cambridge, MA 02139

Dr. Lynne Reder
Department of Psychology
Carnegie-Mellon University
Schenley Park

Dr. Judith Orasanu
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Tjeerd Plomp
Twente U of Tech, Dept of Ed
P.O. Box 217, 7500 AE ENSCHEDE
THE NETHERLANDS

Dr. James A. Reggia
Sch of Med, Dept of Neurology
22 So Greene St, U of Maryland
Baltimore, MD 21201

Professor Seymour Papert
20C-109
MIT
Cambridge, MA 02139

Dr. Martha Polson
Dept of Psych, Campus Box 346
University of Colorado
Boulder, CO 80309

Dr. Frederick Reif
Physics Department
University of California
Berkeley, CA 94720

Dr. James Paulson
Dept of Psych, Portland State U
P. O. Box 751
Portland, OR 97207

Dr. Peter Polson
University of Colorado
Department of Psychology
Boulder, CO 80309

Dr. Lauren Resnick
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15213

Dr. Roy Pea
Bank Street College of Education
610 West 112th Street
New York, NY 10025

Dr. Steven E. Poltrock
MCC, Echelon Bldg #1
9430 Research Blvd
Austin, TX 78759-6509

Dr. Gil Ricard
Mail Stop C04-14
Grumman Aerospace Corp.
Bethpage, NY 11714

Dr. Douglas Pearse
DCIEM
Box 2000
Downsview, Ontario CANADA

Dr. Harry E. Pople
U of Pittsburgh, Decision Syst Lab
1360 Scaife Hall
Pittsburgh, PA 15261

Mark Richer
1041 Lake Street
San Francisco, CA 94118

Dr. James W. Pellegrino
Department of Psychology
University of California
Santa Barbara, CA 93106

Dr. Mary C. Potter
Department of Psychology
MIT (E-10-032)
Cambridge, MA 02139

Dr. Mary S. Riley
Program in Cognitive Science
Ctr for Human Info Processing, UCSD
La Jolla, CA 92093

Dr. Linda G. Roberts, Sci. Ed.
& Trans Prog. Tech Assessment
Congress of the United States
Washington, DC 20510

Dr. Judith Segal
OERI
555 New Jersey Avenue, NW
Washington, DC 20208

Special Asst for Marine
Corps Matters, ONR Code 00MC
800 North Quincy Street
Arlington, VA 22217-5000

Dr. William B. Rouse
Search Technology, Inc.
25-b Technology Park/Atlanta
Norcross, GA 30092

Dr. Sylvia A. S. Shafto
Department of Computer Science
Towson State University
Towson, MD 21204

Dr. Kathryn T. Spoehr
Brown University
Department of Psychology
Providence, RI 02912

Dr. David Rumelhart
Ctr. for Human Info. Processing
University of California
La Jolla, CA 92093

Dr. Ben Shneiderman
Department of Computer Science
University of Maryland
College Park, MD 20742

Dr. Robert Sternberg
Dept of Psych, Yale University
Box 11A, Yale Station
New Haven, CT 06520

Dr. Roger Schank
Comp Sci Dept, Yale University
P.O. Box 2158
New Haven, CT 06520

Dr. Lee Shulman
Stanford University
1040 Cathcart Way
Stanford, CA 94305

Dr. Albert Stevens
Bolt Beranek & Newman, Inc.
10 Moulton Street
Cambridge, MA 02238

Dr. Walter Schneider
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Robert Siegler
Carnegie-Mellon University
Dept of Psych, Schenley Park
Pittsburgh, PA 15213

Dr. Thomas Sticht
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Alan H. Schoenfeld
Department of Education, EMST
University of California
Berkeley, CA 94720

Dr. Derek Sleeman
Stanford University
School of Education
Stanford, CA 94305

Dr. John Tangney
AFOSR/NL
Bolling AFB, DC 20332

Dr. Janet Schofield
University of Pittsburgh, LRDC
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Edward E. Smith
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. Kikumi Tatsuoka
CERL
252 Engineering Research Lab.
Urbana, IL 61801

Karen A. Schriver
Department of English
Carnegie-Mellon University
Pittsburgh, PA 15213

Dr. Richard E. Snow
Department of Psychology
Stanford University
Stanford, CA 94306

Technical Director, ARI
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Judah L. Schwartz
MIT
20C-120
Cambridge, MA 02139

Dr. Elliot Soloway
Comp Sci Dept, Yale University
P.O. Box 2158
New Haven, CT 06520

Dr. Perry W. Thorndyke
FMC Corp., Central Engineering Labs
1185 Coleman Avenue, Box 580
Santa Clara, CA 95052

Dr. Marc Sebrechts
Department of Psychology
Wesleyan University
Middletown, CT 06475

Dr. Richard Sorensen
Navy Personnel R & D Center
San Diego, CA 92152-6800

Professor Chu Tien-Chen
Mathematics Department
National Taiwan University
Taipei, TAIWAN

Dr. Douglas Towne
Behavioral Technology Labs
1845 S. Elena Avenue
Redondo Beach, CA 90277

Dr. Robert A. Wisner
Army Inst. for the Beh. and Soc. Sci.
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Kurt Van Lehn
Carnegie-Mellon University
Dept of Psych, Schenley Park
Pittsburgh, PA 15213

Mr. John H. Wolfe
Navy Personnel R & D Center
San Diego, CA 92152

Dr. Beth Warren
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. Wallace Wulfeck, III
Navy Personnel R & D Center
San Diego, CA 92152-6800

Dr. Donald Weitzman
MITRE
1820 Dolley Madison Blvd.
MacLean, VA 22102

Dr. Joe Yasutake
AFHRL/LRT
Lowry AFB, CO 80230

Dr. Keith T. Wescourt
FMC Corp, Central Engineering Labs
1185 Coleman Ave, Box 580
Santa Clara, CA 95052

Dr. Masoud Yazdani
Department of Computer Science
University of Exeter
Exeter EX4 4QL Devon, ENGLAND

Dr. Douglas Wetzel
Code 12
Navy Personnel R&D Center
San Diego, CA 92152-6800

Mr. Carl York
System Development Foundation
181 Lytton Avenue, Suite 210
Palo Alto, CA 94301

Dr. Barbara White
Bolt Beranek & Newman, Inc.
10 Moulton Street
Cambridge, MA 02238

Dr. Joseph L. Young
Memory & Cognitive Processes
National Science Foundation
Washington, DC 20550

Dr. Christopher Wickens
Department of Psychology
University of Illinois
Champaign, IL 61820

Dr. Heather Wild
Naval Air Development Center
Code 6021
Warminster, PA 18974-5000

Dr. Michael Williams
IntelliCorp
1975 El Camino Real West
Mountain View, CA 94040-2216